



Date: March 15, 2017

Attn: Prospective Bidders

Subject: JPL Competitive Request for Proposal (RFP) No. BAK-2624-935432 for Office Supplies and Products

Reference: Enclosures

The Jet Propulsion Laboratory (JPL) invites your organization to submit a written proposal in conformance with the instructions contained in this letter and its enclosures, which comprise the RFP for JPL's acquisition of the subject effort.

The electronic RFP is available at the following website:

<https://www.jpl.nasa.gov/acquisition/opportunities/>.

JPL intends to issue an Indefinite Delivery Subcontract (IDS), mirroring the attached Specimen Subcontract, for the purchase and delivery of office supplies and products. This subcontract will have a period of performance of two (2) years, from October 1, 2017 through September 30, 2017, with the option to extend for up to thirty-six (36) additional months. JPL estimates the dollar expenditure for these purchases to total \$1,750,000.00 per year. This figure should be used for planning purposes only and is not to be considered a commitment by JPL for this requirement.

This procurement is a 100% small business set-aside under North American Industry Classification System (NAICS) code 453210.

This RFP does not commit JPL or the Government of the United States to pay any costs incurred in submitting your proposal, making studies or designs for preparing the proposal, or in procuring or subcontracting for services or supplies related to the proposal.

Please note that this proposal consists of three Volumes: Volume I – Technical Management Proposal, Volume II – Cost/Price Proposal, and Volume III – Past Performance. The electronic copy of Volume III is due no later than **April 7, 2017, 3 PM Pacific Time**. A physical and electronic copy of Volumes I and II are due at JPL no later than **April 26, 2017, 3 PM Pacific Time**. Your proposal is valid for a period of 150 days after the RFP closing date.

Questions on this proposal will not be accepted past April 19, 2017, 3 PM Pacific Time. As a courtesy to JPL, you are requested to provide the undersigned, by no later than close of business March 29, 2017, an email statement on your intention to submit a bid.

Oral Presentations will be scheduled with each bidder within one (1) to three (3) weeks after the RFP due date.

Your participation in this solicitation is greatly appreciated. Should you have any questions, please address them to the undersigned by e-mail. Responses will be provided by JPL in writing, and identified as Addenda at the above-cited RFP website.

Very truly yours,

Brian A. Khorshad  
Subcontracts Manager  
Phone No.: (818) 354-7820  
E-mail: [Brian.A.Khorshad@jpl.nasa.gov](mailto:Brian.A.Khorshad@jpl.nasa.gov)

Enclosures: RFP consisting of:

- Cover Sheet and Table of Contents
- General Instructions
- Technical/Management Instructions
- Cost/Price Instructions
- RFP Attachments

Specimen Contract consisting of:

- Specimen Contract
- Referenced GPs & AGPs
- Referenced Exhibits
- Subcontract Forms Set



**TECHNOLOGY**

**JET PROPULSION LABORATORY  
CALIFORNIA INSTITUTE OF**

# **REQUEST FOR PROPOSAL**

**REQUEST FOR PROPOSAL NO.: BAK-2624-935432**

**FOR:**

**OFFICE SUPPLIES AND PRODUCTS**

**THIS IS A 100% SMALL BUSINESS SET-ASIDE**

**PROPOSALS ARE TO BE RECEIVED AT JPL NO LATER THAN:**

**Date: April 26, 2017**

**Local Time: 3:00 p.m.**

## **COMMUNICATIONS IN REFERENCE TO THIS RFP**

It is requested that any communication in reference to this RFP be in writing and directed to the attention of:

**Name: Brian A. Khorshad**  
**Title: Subcontracts Manager**

**Mail Stop: 241-211**  
**Phone: (818) 354-7820**  
**Fax: (818) 354-0816**  
**E-Mail: Brian.A.Khorshad@jpl.nasa.gov**

**California Institute of Technology  
Jet Propulsion Laboratory  
4800 Oak Grove Drive  
Pasadena, CA 91109-8099**

**Date of Issuance: March 15, 2017**

## TABLE OF CONTENTS

RFP No.: BAK-2624-935432

### 1. REQUEST FOR PROPOSAL

	Pages
<b>GENERAL INSTRUCTIONS .....</b>	<b>1</b>
1.0 GENERAL REQUIREMENTS/INFORMATION	
2.0 LATE PROPOSALS	
3.0 NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS)	
4.0 ORAL PROPOSAL PRESENTATION (OPP) INFORMATION	
5.0 SOURCE EVALUATION AND SELECTION PROCESS	
6.0 RESTRICTIVE MARKINGS	
7.0 EXCEPTIONS/DECLINATIONS	
<b>VOLUME I: TECHNICAL/MANAGEMENT PROPOSAL INSTRUCTIONS .....</b>	<b>7</b>
1.0 MANDATORY QUALIFICATION CRITERION	
2.0 OPTION EVALUATION	
3.0 TECHNICAL/MANAGEMENT EVALUATION CRITERIA AND FACTORS	
<b>VOLUME II: PROPOSAL PRICE INSTRUCTIONS .....</b>	<b>15</b>
1.0 PROPOSAL PRICING	
2.0 MSRP LESS FIXED DISCOUNT	
3.0 PROVISIONAL PARTIAL PAYMENTS	
4.0 SUPPLEMENTAL BUSINESS/COST INFORMATION	
<b>VOLUME III: PAST PERFORMANCE INSTRUCTIONS .....</b>	<b>18</b>
1.0 PAGE LIMITATION	
2.0 REQUIRED CUSTOMER CONTACT AND SUBCONTRACT INFORMATION	

**ATTACHMENTS TO THE SOLICITATION.** See form JPL 2839 for a list of Attachments

This Section of this RFP consists of those forms and documents containing information applicable to this RFP. Group A Attachments must be completed and attached to your proposal. Group B Attachments consist of forms and documents for informational purposes only. *Both A and B Attachments can be found through the electronic address identified below.* Note that Group B Attachments are very important and may become requirements under the Subcontract.

World Wide Web: <https://www.jpl.nasa.gov/acquisition/terms-conditions>

### 2. SPECIMEN SUBCONTRACT, Dated March 15, 2017

## **GENERAL INSTRUCTIONS**

*(involving Oral Proposal Presentation of Technical/Management Proposal)*

### **1.0 GENERAL REQUIREMENTS/INFORMATION AND NOTIFICATION OF ORAL PROPOSALS**

The effort to be performed will be in accordance with the specimen subcontract; if you choose to submit more than one proposal for this effort, each proposal must be responsive to JPL's requirements, independently complete and under separate cover. JPL reserves the right to retain all proposal information submitted in response to this RFP.

Proposers shall participate in this RFP process with the express understanding that the California Institute of Technology (including its operating division, JPL) and the United States Government shall not pay any proposal preparation or other costs related to the submission of proposals or costs otherwise incurred by proposers in anticipation of a subcontract pursuant to this RFP. Proposers shall participate in this RFP process solely at their own risk and expense. JPL reserves the right to cancel this RFP and to reject any or all proposals.

#### **1.1 Request for Proposal (RFP) Format**

The Request for Proposal (RFP) has been divided into the following parts. All parts shall be submitted to JPL by the due date specified on the RFP cover page. Your proposal shall be presented as an Oral Proposal Presentation (OPP) in addition to the submission of paper and electronic copies of your proposal.

- Volume I: Technical/Management Proposal
  - This part addresses the RFP's proposal evaluation criteria.
- Part II: Price Proposal
  - This part outlines the requirements to be followed in preparing the pricing proposal and the financial statement/responsibility.
- Part III: Past Performance
  - This part outlines the RFP's past performance proposal instructions.
- Attachments to the Solicitation:
  - This part references the forms and documents attached to the RFP. All forms under "Group A" must be completed and returned as part of your proposal and the forms under "Group B", is for use in preparing your quotation/proposal.

#### **1.2 Oral Proposal Presentation (OPP)**

The Offeror shall present an Oral Proposal Presentation (OPP) of slides/process maps/graphs demonstrating their proposed approach of meeting the RFP's Volume I, Technical/Management Proposal. Visuals, props, etc. are welcomed.

#### **1.3 RFP Deliverables**

- All RFP deliverables shall be submitted to JPL by the due date and formats specified below.
- RFP deliverables include the slides that will be used for the Oral Proposal Presentation (OPP), and any items specified immediately below:

Volume Number	Due Date	Copies/Format	Deliverables
I	April 26, 2017	(1) Electronic; (1) Paper	Oral Proposal Presentation Slides
II	April 26, 2017	(1) Electronic; (1) Paper	RFP BAK-2624-935432 Excel Spreadsheet
III	April 9, 2017	(1) Electronic	Past Performance Information
Attachments to the Solicitation	April 26, 2017	(1) Electronic; (1) Paper	A-1; A-4; A-7; A-14; B-8; B-10

- 1) All text must be printable on 8 ½ x 11-inch paper.
- 2) Font size shall not be smaller than 10-point character height. Figure and table callout text shall not be smaller than 8-point character height.

#### 1.4 Mailed/Hand-Carried Proposals

All hardcopies shall be mailed or delivered by hand to: JPL's Visitor Control Center, 4800 Oak Grove Drive, Pasadena, Building 249 for time/date stamping, between the hours of 7:30 a.m. – 4:30 p.m., Monday through Friday by the time and date stated on the RFP cover sheet. **NOTE:** JPL is closed every other Friday (for example Friday March 17).

Affix a yellow label to the envelope containing the original RFP deliverables with:

- JPL's address (referenced above)
- "Attention": Brian A. Khorshad, Subcontracts Manager Mail Stop 241-211
- All envelopes/containers must bear the RFP No. BAK-2624-935432

#### 1.5 Electronic Submissions

JPL requires one e-mailed electronic copy of the documents listed in part 1.3 above. Electronic copies must meet the following requirements.

- Have a scanned signature or an e-signature.
- Be limited to one or more of the following file formats:
  - ".pdf" (preferred)
  - ".doc" or ".docx" for Word files
  - ".xls" or ".xlsx" for Excel files
  - ".ppt" or ".pptx" for PowerPoint files.

Notify the Subcontracts Manager if multiple e-mails are needed to submit the documents required for one of the Volumes of your proposal. Note that all emailed documents must be received before any of the stated deadlines.

#### 1.6 Data

If the proposal contains data that are not to be disclosed for any purpose other than for proposal evaluation, you must place on the cover sheet of each proposal volume the following wording:

*“Data contained in pages \_\_\_\_\_ of this proposal furnished in connection with RFP No. BAK-2624-935432 shall not be used or disclosed, except for evaluation purposes, provided that if a subcontract is awarded to this offeror as a result of or in connection with the submission of this proposal, JPL and the Government shall have the right to use or disclose this data to the extent provided in the subcontract. This restriction does not limit JPL’s right to use or disclose any data obtained from another source without restriction.”*

## **1.7 Requests for Clarification/RFP Addenda**

During the proposal preparation period, all requests for clarification and/or additional information, must be submitted by e-mail to the Subcontracts Manager. When appropriate, responses to requests, as well as any JPL initiated changes, will be provided to prospective proposer(s) on the RFP website as addenda to the RFP.

JPL will not be responsible for explanations or interpretations of the RFP by any other means. Note: You must acknowledge receipt of all addenda on your acknowledgment to the RFP, Attachment A.

## **2.0 LATE PROPOSALS:**

Any proposal, portion of a proposal, or unrequested proposal revision received at JPL after the date(s) and time(s) specified on the cover page of this RFP will not be considered for evaluation and award, except under any of the following circumstances:

- 2.1 JPL determines that the late receipt was due solely to a delay by the U.S. Postal Service for which the offeror was not responsible. Timely postmark or receipt of registered, Certified Mail or Express Mail “next-day service,” establishing the time of deposit must be evidenced.
- 2.2 JPL determines that the proposal was late due solely to mishandling by JPL after receipt at JPL, provided that the timely receipt at JPL is evidenced.
- 2.3 No acceptable proposal(s) are received as of the proposal due date(s) and time.
- 2.4 If any emergency or unanticipated event interrupts normal JPL operations so that proposals cannot be received by JPL by the date(s) and time(s) specified on the cover page of this RFP, and urgent JPL requirements preclude amendment of the solicitation closing date, the date(s) and time(s) specified for receipt of proposals will be extended to the same time of day specified in the solicitation on the first work day on which normal JPL operations resume.

## **3.0 NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS)**

The North American Industry Classification System (NAICS) code for this acquisition is **453210**.

## **4.0 ORAL PROPOSAL PRESENTATION (OPP) INFORMATION**

### **4.1 Prior to OPP** (in the following order):

- 4.1.1 The Oral Proposal Presentation (OPP) slides of Volume I shall be submitted by the due date specified in paragraph 1.3.

- 4.1.2 Volumes I, II and III, as well as the attachments to the solicitation are to be submitted by the specified due dates in Paragraph 1.3.
- 4.1.3 Seven (7) to fourteen (14) calendar days prior to proposer's OPP, JPL will notify each proposer of its date to present its OPP. JPL will determine the OPP dates, and will attempt to provide a range of dates to bidders on a first-come, first-serve basis.
- 4.1.4 Two (2) or more working days before the scheduled date of the OPP, JPL may submit advance written questions concerning any parts of your proposal.

**4.2 Day of OPP (in the following order):**

4.2.1 Schedule:

Oral Proposal Presentation (OPP) – Four (4)-hours  
Break/JPL Caucus- Two (2)-hours  
Communications Segment- Two (2)-hours

4.2.2 Oral Proposal Presentation:

Part I of your proposal shall be presented orally and shall be based on the previously submitted slides, which are to be shown in concert with the OPP. The time allotted for the OPP is two (2)-hours. You may organize your presentation and allocate your time in any manner you see fit; keeping in mind, however, the relative weight of each evaluation criterion, specified in Part I of the RFP, and your ability to cover the material submitted.

4.2.1.1 The OPP shall address any JPL-submitted advanced questions per paragraph 4.1.4 above.

4.2.1.2 JPL will formulate questions during the OPP to be asked by JPL during the Communications Segment per paragraph 4.2.4 below. Although JPL will attempt to not interrupt the presenters during the OPP, if requested by JPL the offeror may offer additional verbal explanations of the slides during the OPP.

4.2.3 Break/JPL Caucus:

After the OPP, JPL will caucus for up to two (2) hours to finalize questions stemming from the OPP followed by the Communications Segment, pursuant to 4.2.4 below.

4.2.4 Communications Segment:

On the same day, or as otherwise directed by JPL, after the OPP, JPL may, at its discretion, conduct communications to clarify proposal ambiguities or other concerns/issues, such as perceived deficiencies, weaknesses and/or strengths, errors, omissions or mistakes in bid, assess proposed personnel and costs, or to clarify past performance information [if any], when deemed necessary.



The OPP and any communications will not be audio or video recorded by JPL or the presenter. Total time for OPP, lunch, JPL caucus, and any communications is anticipated to last eight (8) or fewer hours.

## **5.0 SOURCE EVALUATION AND SELECTION PROCESS**

The basis of source selection is predicated on the below (JPL, at its discretion, may waive minor informalities and minor irregularities in proposals received).

### **5.1 Pre-OPP Determination of Non-Responsiveness**

JPL reserves the right to make a “pre-OPP determination” of non-responsiveness, based on the submitted, written materials if: (i) there is non-compliance with the mandatory qualifications; or (ii) it is clear that the OPP would not conform to the requirements of this RFP.

### **5.2 Source Selection Basis**

Source selection shall be based on (i) the previously submitted Power Point slides, (ii) the OPP **including** a demonstration of the proposed and/or similar website to be used for the JPL catalog, and (iii) the items listed immediately below.

- RFP attachments
- Supplementary written material, which cannot be presented orally (such as visuals, props, charts, matrices, etc.)
- Volume II – Proposal Price
- Volume III – Past Performance

### **5.3 Proposal Evaluation**

Proposals will be evaluated and scored according to the criteria described in Volume I – Technical/Management Proposal. The proposed price shall be a substantial factor in source selection, and is approximately equal in importance to the combined technical and management areas. Source selection will be based on the responsive, responsible (within the meaning of Federal Acquisition Regulation, Subpart 9.1) offeror whose proposal is determined to represent the best value to JPL. The closer the offerors are in the qualitative (evaluated) technical and management areas, the more important price can become.

JPL, at its discretion, reserves the right to continue any communications with Offerors deemed necessary for the purpose of proposal clarifications.

## **6.0 RESTRICTIVE MARKINGS**

- 6.1 JPL is a federally funded research and development center. JPL’s Prime Contract with NASA requires JPL to protect and preserve the Government’s technical data rights. The attached Specimen Subcontract requires the delivery of technical data. The General Provisions require that: (1) subcontractor-owned (proprietary) technical data delivered to JPL be marked and provided as limited rights data, and (2) all such restrictive markings be proper. Limited rights data can be used by the Government and JPL in furtherance of Government contract obligations.

- 6.2 In your proposal, include a list of any technical data that you expect to deliver to JPL in performance of the Specimen Subcontract that will be marked with restrictive markings per the General Provisions entitled “Rights in Data – General” and “Limitation on Restrictive Markings.”

## **7.0 EXCEPTIONS/DECLINATIONS**

JPL has made the determination that any exceptions to JPL’s GP and/or AGPs may render your proposal unacceptable.

## **VOLUME I: TECHNICAL/MANAGEMENT PROPOSAL INSTRUCTIONS**

Present and organize your proposal in accordance with the following:

### **1.0 MANDATORY QUALIFICATIONS**

- 1.1 Proposers must meet the following mandatory qualifications in order to be considered a qualified source and thereby eligible for award. Include how you meet these mandatory qualifications as a distinct section of your Technical/Management proposal.
  - 1.1.1 Proposers must have minimum of one (1) year continuous Electronic Data Interchange (EDI) or cXML Punchout experience by 03/15/2017. Be able to transmit and receive purchase-related transactions through EDI or cXML per Specimen Subcontract, Exhibit III, Electronic Communications.
 

If EDI/cXML and Punchout website is managed by a 3<sup>rd</sup> party partner, a minimum one (1) year business experience with that partner or combined one (1) year experience with similar businesses by time of subcontract award. List direct or partnering EDI/cXML experience that satisfies this requirement—provide customer names, contract numbers, period of performance, and brief description of EDI/cXML transactions.
  - 1.1.2 Proposer must be able to demonstrate ability to meet JPL Barcode requirements per Exhibit IV, JPL Barcode Specifications, of the Specimen Subcontract by time of subcontract award, or must have at least six (6) months experience with custom barcoding to include PO information on customer delivery label.

### **2.0 OPTION EVALUATION**

- 2.1 The Specimen Subcontract contains an Option Article.

Both the basic Subcontract requirements and the Subcontract Option Article will be evaluated for source selection purposes as follows:

- ☒ The cost/or price estimate and probable cost/price realism thereof.
- ☒ Technical/Management merit (as determined by the below Part 3.0).

### **3.0 TECHNICAL/MANAGEMENT EVALUATION CRITERIA AND FACTORS**

JPL will evaluate Volume I of your proposal based on the information asked for in the below table and subsequent "Technical/Management Criteria and Factors," in respect to the degree to which your proposal meets the requirements/needs of the Specimen Subcontract.

The degree to which the requirements/needs are met may include any number of considerations, such as the suitability of the various areas of the technical/management approach(es), the level of understanding of the requirements, the extent of insight into the technical/management challenges and their solution(s), the effectiveness of management structure, the relevancy of corporate and/or personnel experience, etc., as is appropriate for each area of evaluation.

<b>VOLUME I - TECHNICAL/MANAGEMENT EVALUATION CRITERIA AND FACTORS</b>				
<b>TECHNICAL/MANAGEMENT CRITERIA AND THEIR WEIGHTING</b>		<b>PROPOSAL ORGANIZATION</b>		
Criteria	Weighting	No. of Copies	<b>Page Limit: None</b>	
			Recom-mended	Re-quired
<b>TECHNICAL/MANAGEMENT CRITERIA</b>		1 Electronic; 1 Paper	N/A	N/A
<b>Criterion T1 – Operational Approach</b> Factor 1: High-level flow chart for e-Business System Factor 2: Proposed punchout process Factor 3: Website and system security Factor 4: Electronic communications approach (EDI/VAN or cXML) Factor 5: Evaluated receipt settlement Factor 6: Satisfy 2-day delivery requirement Factor 7: Ability to meet packaging/labeling requirements (barcoding) Factor 8: Product Returns/Discrepancies Factor 9: Breadth of product offering Factor 10: Process for addition of new catalog items Factor 11: Approach and timeliness on catalog item addition/change/deletion Factor 12: System availability and scheduled downtime	400			
<b>Criterion T2 – Punchout Website Functionality</b> Factor 1: Ability to supply JPL-specific catalog Factor 2: Website Usability/User-friendliness Factor 3: Punchout website search functionality Factor 4: Category organization Factor 5: Product Page information, including manufacturer part number, description, picture(s) or graphic(s), JPL price Factor 6: Seamless return to JPL iProcurement Factor 7: Order tracking capability Factor 8: Any additional website features	300			
<b>Criteria T3 – Related Experience</b> Factor 1: Past & present similar experience Factor 2: EDI/cXML & Similar Experience Factor 3: Personnel	100			
<b>Criterion M1 – Management Approach</b> Factor 1: Milestone schedule from subcontract award through system go-live Factor 2: Personnel/facilities/resources Factor 3: Customer Service Support – toll free/local number Factor 4: Ensuring product availability Factor 5: Contingency planning and disaster recovery Factor 6: Reports Factor 7: Ability to negotiate MSRP discounts Factor 8: Teaming arrangement (if applicable)	200			
<b>Total Score Possible:</b>	1,000			

## TECHNICAL/MANAGEMENT CRITERIA AND FACTORS

Any factors listed below under the criteria are not weighted for evaluation and are not listed in any order of importance.

When preparing your Oral Proposal Presentation (OPP) Slides, **refer to the specific criteria number, and/or factor number** that you are addressing. This will assist JPL in tracking your proposal's ability to meet all the requirements.

### 3.1 Criterion T1 – Operation Approach

JPL iProcurement Requirements - Provide an end-to-end description of your proposed eBusiness system and how it is planned to interface with JPL's Oracle iProcurement System based on the information provided in the RFP document, Specimen Subcontract's Statement of Work (SOW) and Specimen Subcontract Exhibits. Specifically include the following as part of the description:

- 3.1.1 Factor 1: High-level flow chart of the system described, detailing the process from shopping on your website to receipt of payment.
- 3.1.2 Factor 2: The proposed punchout process (per requirement of Exhibit II of Specimen Subcontract)
- 3.1.3 Factor 3: The security of your proposed website and system.
- 3.1.4 Factor 4: Your proposed electronic communications approach to accept the JPL Purchase Orders via EDI/VAN per requirement of Specimen Subcontract Exhibit III, Electronic Communications, dated 03/15/2017. Describe your proposed electronic communications approach to accept the JPL Purchase Orders via EDI/VAN or cXML (per requirement of Exhibit VII, EDI Layout Mapping, of the Specimen Subcontract, or Exhibit VIII Sample cXML).
  - 3.1.4.1 Discuss your back-up plan for JPL order processing in the event of EDI or cXML downtime.
  - 3.1.4.2 Indicate whether it is possible to cancel Punchout orders via email or phone call and what a cut-off lead-time for such cancellations might be.
- 3.1.5 Factor 5: Evaluated Receipt Settlement: Discuss your ability to accept JPL's payment process as described in Specimen Subcontract, Article 2. Price and Payment Provisions, Paragraph 15.0 Remittance Advice & Evaluated Receipt Settlement (ERS)
- 3.1.6 Factor 6: Provide a plan to meet the two (2) business day delivery requirements specified in the SOW, including how the plan differs from your normal delivery schedule. Please describe in detail any products or specific manufactures that will not fit into this delivery requirement. Also, provide historical data, for the last six (6) months, on your average delivery time to your customers.
  - 3.1.6.1 If you propose to use your own delivery approach, describe the method in detail, including the quality and quantity of vehicles and the qualified personnel that will be used in support of the effort along with a comprehensive back-up delivery procedure. If items will be delivered via common carrier(s), indicate

your preferred carrier name(s) and your experience with them. Describe your package tracking procedure.

- 3.1.7 Factor 7: Meeting Packaging/Barcoding Requirements. Detail your approach for meeting the specified barcode labeling and packing slip requirements as stated in Article 1, Statement of Work (SOW) and Delivery Instructions, of the Specimen Subcontract, Exhibit IV JPL Barcode Specification, and Exhibit V, JPL Product Packaging and Delivery Instructions.
- 3.1.8 Factor 8: Process for product returns, discrepancies, short-shipment per Specimen Subcontract, Article 1, Section 8.0, Discrepancy Handling and Return Process.
- 3.1.9 Factor 9: Demonstrate the possible breadth of the product offering in the Punchout catalog (e.g. provide line card). State whether min/max requirements for products are negotiable.
- 3.1.10 Factor 10: Describe process for pre-screening new and additional items meeting JPL's requirements of price, product allowability, etc. specified in the Specimen Subcontract.
- 3.1.11 Factor 11: Discuss your approach and the timeframe for executing online catalog product addition/change/deletion as requested by JPL. Clearly address responsible individuals, processes, forms, and records to execute and document such updates.
- 3.1.12 Factor 12: Your system availability and any scheduled downtime, providing recent data reflecting the system's availability and scheduled downtime from the last six (6) months. Describe your notification process for scheduled downtime and any back-up process for continual website availability.
  - 3.1.12.1 Describe how you will notify JPL of any planned maintenance downtime, or other technical changes that would impact the user experience (including advanced notifications for expiring SSL certs)

## **3.2 Criterion T2 – Punchout Website Functionality**

Please provide a live demonstration of the capabilities of your punchout website, using either a mock-up of the JPL website, or another similar customer, highlighting the following capabilities:

- 3.2.1 Factor 1: Ability to have a JPL-specific catalog carrying only items that have prior JPL approval.
- 3.2.2 Factor 2: The proposed JPL Punchout website functionality and ordering process—with specific steps, screens and maneuverability as demonstrated. Explain and show the user-friendly features of the Punchout site. Describe the amount of customization possible to ensure JPL custom catalog is user-friendly.
  - 3.2.2.1 Include any additional functions such as ability to create a favorites list, save a shopping cart, order history, quick view of item, website help/tips or any other useful functions.
  - 3.2.2.2 Discuss any planned or possible upgrades, as well as any continuing development of the website.

3.2.2.3 Discuss your ability to create a customized JPL home page with pertinent announcements and details that can be updated at JPL's discretion.

3.2.3 Factor 3: The robustness of your search function, and capability of searching using various keywords and filters such as manufacturer, part number, description, category or any other relevant product information.

3.2.3.1 Describe your website's advanced search function, if any, and its capability for specifying multiple criterion for a single search.

3.2.3.2 Describe the website's ability, if any, to search for partial words or phrases.

3.2.4 Factor 4: Describe how your company organizes products on the website.

Describe the categories that items are sorted into (for example: paper, toner, janitorial, breakroom, etc.), and the ability of your website to drill down into sub-categories.

3.2.4.1 Describe the website's ability to filter items, based on factors such as price, name, popularity, or any other qualifying items.

3.2.5 Factor 5: Discuss if the detailed product information below can be provided (and customizability of such information) for each catalog item on the website:

- Total JPL price
- Product description
- Manufacturer
- Manufacturer part number
- Lead time
- Product Image(s)/Picture(s)/Graphic(s)
- Material Safety Data Sheet (MSDS), if applicable
- Packaging type
- Substitute Product/Related Product Information
- Pre/Post/Total Recycled Content
- Available quantities
- List any other additional information available

3.2.6 Factor 6: Discuss your ability to create a link or button that will allow customers to return to the JPL Purchasing website without making a purchase. Also discuss placement of this link or button to ensure that it is visible to JPL users.

3.2.7 Factor 7: Describe the order tracking capability on your website, including information required to track product delivery, estimates on delivery, and any other information that would be made available.

3.2.8 Factor 8: Describe any additional features, not previously mentioned, that can be made available on the JPL punchout website.

### **3.3 Criterion T3 – Related Experience**

Discuss any experience gained from recent or on-going efforts, or specific area(s) of eCommerce and your ability to meet customer requirements. Identify three (3) subcontracts in

the last three (3) years with requirements similar to those described in this RFP and Specimen Subcontracts including the following information.

**3.3.1 Factor 1: Past & present similar experience:**

Provide a concise discussion of your company's experience on requirements similar to those described in this RFP for office supplies. Describe the range of products you offered to these customers, specifying to which categories of office supplies/products it is limited to.

**3.3.2 Factor 2: EDI/cXML & eBusiness experience:**

**3.3.2.1** List each customer's company name, subcontract number and dollar amount, contact name, address telephone number and email address.

**3.3.2.2** Provide a description of the effort performed, including specifics of Punchout environment and the type of system;

**3.3.2.3** Indicate the approximate volume of items delivered per year; average delivery/lead-time of items; and number of users accessing your site.

**3.3.3 Factor 3: Personnel**

Discuss the personnel and/or 3<sup>rd</sup> Party Partner(s), who have worked with your company on the following requirements: cXML, EDI/VAN; Punchout website hosting; custom barcoding; and e-business delivery agreements. In the description of personnel/3<sup>rd</sup> Party Partner(s) include their applicable experience.

**3.4 Criterion M1 – Management Approach**

Describe in detail, your plan for implementing and managing this effort. Your plan should show how the performance and delivery schedules of the Specimen Subcontract will be met and the necessary steps for successful implementation of the JPL iProcurement System. Provide information about product availability including any stocking plan, warehousing, and/or wholesalers/distributors used. The following areas must be discussed in detail:

**3.4.1 Factor 1:** Include a milestone schedule, beginning with subcontract award, with description of each major task and sub-task necessary to get IT and other resources in place to start supplying JPL with items in base catalog through a JPL-specific iProcurement Punchout Website.

**3.4.2 Factor 2: Personnel/Facilities/Resources**

**3.4.2.1** Describe the staff resources that will be assigned to suitably accomplish the effort described in Specimen Subcontract. Include a complete organizational chart of all key personnel that will be associated with this Subcontract including a detailed outline of their duties/experience, lines of authority and communications. Discuss key personnel back-ups in the event of illness, vacation, etc.

**3.4.2.2** If heavy reliance is to be placed on distributors or third party sources, also indicate their key personnel who will be involved in implementing JPL's requirements and describe the integration of distributor's personnel into your company's organizational structure, lines of communication, authority, and staffing plan. Indicate the business relationship between the proposer and team



members, such as contractor, subcontractor, joint venture or the like; including their physical locations as well as their inventory depth and breadth.

3.4.2.3 Discuss your escalation plan for technical and customer support issues. Discuss the avenues available for customers to notify your company of issues (questions/comments link on website, email support, directly through the customer representative, etc.). Make sure to identify specific personnel that would assist in fixing an outstanding issue.

### 3.4.3 Factor 3: Customer Service Support

3.4.3.1 Address your ability to provide a Customer Service contact at a local or toll-free telephone number for JPL personnel to use regarding product questions, recommendations for products and other non-technical and non-contractual issues.

3.4.3.2 Describe the timeframe and process (how you will communicate) for responding to the JPL end user's email and phone requests below:

3.4.3.2.1 Describe your approach for supplying the JPL Subcontracts Manager with product information, as required by the SOW.

3.4.3.2.2 Describe your approach for supplying JPL end user with product technical detail and product recommendations.

3.4.3.2.3 Describe your approach for providing order status and product tracking information from the time of order placement to delivery to the JPL facility.

3.4.3.2.4 Discuss how you will proactively handle sourcing issues (i.e. manufacturer or third party source that can no longer provide the required catalog products).

3.4.3.2.5 Discuss how late deliveries will be handled and resolved.

### 3.4.4 Factor 4: Ensuring Product Availability

3.4.4.1 Describe how you will monitor the wholesalers/distributors in terms of quality control, transportation, and packaging control. If heavy reliance is expected to be placed on distributor/3<sup>rd</sup> party partners, indicate the company(ies) expected to be used, your business relationship, the percentage of business you do with them, their locations and inventory depth and breadth.

3.4.4.2 Describe how you forecast with your suppliers to ensure that products are available and in stock.

### 3.4.5 Factor 5: Contingency Planning and Disaster Recovery

3.4.5.1 Describe your contingency and disaster recovery plan as referenced in Specimen Subcontract, Article 1 Statement of Work and Delivery Instructions, Paragraph 1.6.

3.4.5.2 Describe your back-up data process and back-up plan or system for down-time of the Electronic Data Interchange (EDI) acquisition system between JPL and the Subcontractor

3.4.6 Factor 6: Describe your ability to provide reports, including reports specified in Specimen Subcontract, Article I Statement of Work and Delivery Instructions, Paragraph 5.0 Reporting And Management Review Requirements.

3.4.6.1 In addition to the reports described above, discuss any additional ad hoc reporting systems available through the punchout website, which will allow the site administrator/ subcontracts manager to gather data on purchase history.

3.4.7 Factor 7: Describe your company's ability to negotiate discounts from MSRP from manufacturers. Include a list of the companies that you have negotiated with, as well as the discounts you were able to obtain, and provide to JPL under this subcontract.

3.4.8 Factor 8: *Teaming Arrangement (If Applicable)* If the Proposer intends to bid with pre-selected third-party teaming partners, please describe: 1) the business relationship between the Proposer and Teaming Partners, such as contractor, subcontractor, or joint venture or the like, 2) any ownership percentage or shared contract employees teaming partners may have in the Proposer company, 3) prior business history between the proposer and teaming partners, and 4) the relative roles and responsibilities between the Proposer and Teaming Partners, including their respective work scopes, personnel and income allotment expected from this subcontract.

3.4.8.1 By submission of a proposal and subsequent execution of any resulting subcontract, it is agreed that in performance of this subcontract more than 50 percent of the cost of subcontract performance shall be incurred by the Proposer, teaming partner costs are not to be considered in determining this "more than 50 percent" cost performance requirement.

## VOLUME II: PROPOSAL PRICE INSTRUCTIONS

***This portion of the proposal instructions outlines the requirements to be followed in preparing your fixed-price proposal, and supplemental business/cost information.***

### 1.0 PRICING PROPOSAL OVERVIEW

The price proposal for this RFP is comprised of the attachment *RFP BAK-2624-935432 Excel Spreadsheet*. This document has three tabs: i) *Market Basket*, ii) *Discount Schedule*, iii) *2016 Usage*. For Volume II to be considered complete, tabs (i) and (ii) must be completed.

Pricing for this proposal will be based on Manufacturer Suggested Retail Price (MSRP) Less Discount. The JPL Price for items shall be based on the current MSRP less a fixed percentage discount per manufacturer. This pricing methodology is detailed in Section 3.0 below.

- 1.1 Tab (i), *Market Basket*, must be completed per the instructions found at the very top of this tab. This completed tab will be used to determine a baseline price upon which your company's pricing proposal will be evaluated. More information on this tab is provided below in sections 2.0, Manufacturer Suggested Retail Price (MSRP) Less Fixed Discount, and 3.0, Pricing Instructions.
- 1.2 Tab (ii), *Discount Schedule*, must also be completed, and will represent the discount percentages your company will offer to JPL by manufacturer. This tab will be used to create Exhibit I to the Specimen Subcontract, Manufacturer's Discount Schedule, should your company be selected as the Subcontractor.
  - 1.2.1 If items from any of the manufacturers identified on tab (ii) cannot be delivered to JPL within two (2) business days, indicate days needed to deliver to JPL.
- 1.3 Tab (iii), *2016 Usage*, lists the items and quantities of office supplies JPL has ordered in Calendar Year 2016 (January 1, 2016 through December 31, 2016). These quantities are provided as information to assist in the preparation of your price proposal. ***However, these quantities do not reflect any commitment from JPL for future orders.***

### 2.0 MANUFACTURER SUGGESTED RETAIL PRICE (MSRP) LESS FIXED DISCOUNT

- 2.1 Pricing for this effort will be based on the MSRP, hereinafter referred to as "List Price". When MSRP is not available, a published price list or third party will be used. Clearly identify any items that do not have an associated List Price.
- 2.2 Fixed Percentage Discount. The proposer shall provide a fixed percentage discount off the MSRP for each manufacturer shown on the Office Supplies Pricing Proposal and Discount Schedule spreadsheet for all products listed.
- 2.3 JPL Unit Price. The proposer shall provide JPL with the unit price using the following formula:
  - 2.3.1  $\text{MSRP Less Percentage Discount} = \text{JPL Unit Price}$
  - 2.3.2 The Unit Price shall be inclusive of all transportation, packaging, handling charges, indirect costs, profit, overhead, burden, and all other services required by Article 1, SOW, or as outlined in your proposal.

## 2.4 JPL Extended Price.

The extended price for proposal evaluation purposes shall be calculated automatically within the JPL provided spreadsheet using the following formula:

$$\text{JPL Unit Price} \times \text{Usage} = \text{Extended Price}$$

- 2.5 The proposer shall provide discounts by item manufacturer on tab (ii), *Discount Schedule of RFP BAK-2624-935432 Excel Spreadsheet*.

***The following is an example for clarification:***

Manufacturer Discount Schedule	
Manufacturer	% Discount
3M	30
Avery	45
Imation	25
Hewlett Packard	25
Universal	50
And so forth for all manufacturers	And so forth for all manufacturers

Fixed discounts for each manufacturer will be used for the term of the Subcontract and incorporated as Exhibit I, Manufacturer's Discount Schedule into Article 2, Price and Payment. JPL will reserve the right to review the discounts periodically as requested by the SCM and request changes as appropriate.

- 2.6 For new products supplied by new manufacturers, unit price shall consist of the manufacturer's suggested retail price less a minimum discount of 20%. JPL will reserve the right to review the new manufacturer's fixed percentage discount and request changes as appropriate.

Note: A manufacturer discount of "0" shall indicate no discount is intended. The JPL Price will be the same as the MSRP or List Price. If this were the case, the proposer would enter zero (0) into the discount column of Manufacturer's Percentage Discount Chart spreadsheet.

## 2.7 Supporting Cost Data

- 2.7.1 Proposers shall provide copies of all applicable Price List(s) such as a copy of your published catalog, Essendant/United Pocket Pricer, SP Richards, or manufacturer's price list, as defined in paragraph 2.1 above, for all items with an estimated usage of 1 or more.

## 3.0 PRICING INSTRUCTIONS

- 3.1 Your proposal shall include the information detailed below. Your responses should be inputted into tabs (i) and (ii) of *RFP BAK-2624-935432 Excel Spreadsheet*.
- 3.2 Volume II shall be emailed to the JPL, as well as being printed out in a hard copy format for submittal as an attachment to your proposal. *Omission of the CD-DVD and/or hard copy file may render your proposal non-responsive.*

- 3.3 Upon completion of the Attachment pricing, part numbers, delivery days (Proposer to complete the columns entitled: MSRP & Fixed Discount Percentage. The JPL Price will auto-populate based on the information provided in the aforementioned columns.
- 3.4 JPL Price; and Delivery Days), initial the right corner of each page of the spreadsheets. In the event of any price discrepancy between the signed, original hard copy of the Attachment and the electronic data returned on the CD disc, the signed, original hard copy shall prevail.
- 3.5 Quote each price as a unit measure of one (1) per the unit of measure as specified on the Attachment (i.e. one Box (BX), one Case (CS), one Each (EA) etc.)
- 3.6 Explanations should be provided for any unpriced items.  
  
Note: For any unpriced item, the highest unit price received for that item from other offers will be used to arrive at the total overall proposal price. Price assignment for any items not priced are for evaluation purposes only and not contractual.
- 3.7 Any priced item(s) that cannot be delivered within two (2) business days must be clearly identified on tab (i) with an indication of an alternate delivery time.
- 3.8 The manufacturers called out are based on previous JPL usage of this type of product offering, and will be used as an evaluation method of price comparison from different offers. During negotiations, however, alternative products may be suggested for the JPL Catalog. JPL, in its sole discretion, shall determine the acceptability of any item offered as a substitute and any discount(s) provided will also apply to the substitute item(s) throughout the term of the Subcontract.

#### 4.0 SUPPLEMENTAL BUSINESS/COST INFORMATION

- 4.1 Financial Statement/Responsibility
  - 4.1.1 Submit a copy of your annual financial statements for the last three years and any information regarding additional resources required to perform the proposed effort.
  - 4.1.2 Include a copy of a letter of credit from your bank, if available or applicable, showing how much credit was initially granted to you and how much is available.
  - 4.1.3 Identify any third parties who may have security liens on your intellectual property, personal property, or general intangibles. Identify the nature of the liens and the source of the liens (e.g. court judgment, security agreement, factor agreement, etc.)
  - 4.1.4 Demonstrate you have the financial resources to handle a subcontract of the dollar value anticipated.

### **VOLUME III: PAST PERFORMANCE INSTRUCTIONS**

Provide the information required per Attachment A-14, Past Performance.

JPL will utilize the information provided in A- to assess past performance in technical, management, and cost areas for work efforts similar to this procurement.

Verify that the contact information is current and that the cited contact has agreed to provide relevant experience information to JPL via a JPL-issued Past Performance Questionnaire. Volume III is due to JPL **in advance, by April 9, 2017**.

#### **1.0 Page Limitation**

You are limited to three (3) pages per Subcontract discussed. Any introductory summary must be limited to one page.

## Attachments to the Solicitation

(unless otherwise indicated, below forms are found at: <http://www.jpl.nasa.gov/acquisition/terms-conditions/>)

### **GROUP A – Complete and return as part of your quotation/proposal those marked with an “X”**

#### **Non-Construction and Construction Solicitation Types:**

<input checked="" type="checkbox"/>	A-1	Acknowledgment (Form JPL 2384-A1)
<input type="checkbox"/>	A-2	Cost Accounting Standards (Form JPL 2455-A2)
<input type="checkbox"/>	A-3	Government Property (Form JPL 0544-A3)
<input checked="" type="checkbox"/>	A-4	Acknowledgment - Commercial Items or Services (Form JPL 2384-A4)
<input type="checkbox"/>	A-5	Acknowledgment - CREI Contract (Form JPL 2384-A5)
<input type="checkbox"/>	A-6	Notice of Total Small Business Set-Aside (Form JPL 4022-A6)
<input checked="" type="checkbox"/>	A-7	Notice of Total Small Business Set-Aside – Modified (Form JPL 4022-A7)
<input type="checkbox"/>	A-8	Acknowledgment – RSA Subcontract (Form JPL 2384-A8)
<input checked="" type="checkbox"/>	A-14	Past Performance (Form JPL 0358-A14)
<input type="checkbox"/>	A-15	Cost Element Breakdown - Long Form (Form JPL 0549-A15)
<input type="checkbox"/>	A-16	Determination of Lowest Overall Price – Labor-Hour/Time-and-Material Proposals (Form JPL 0359-A16)
<input type="checkbox"/>	A-19	Cost Elements Breakdown - Short Form (Form JPL 0549-A19)
<input type="checkbox"/>	A-20	Evidence of Adequacy of Accounting System (Form JPL 7370-A20)
<input type="checkbox"/>	A-21	Supplier Information Request (Form JPL 7255-A21) (vendor selected for award who is not in JPL's database)

#### **Construction Solicitation Type Only:**

<input type="checkbox"/>	A-30	Bid Form (Form JPL 3107-A30) NOTE: This Attachment is found in the Solicitation/Bid Package sent to you
<input type="checkbox"/>	A-31	Bid Bond (Form JPL 1825-A31)
<input type="checkbox"/>	A-32	Price Breakdown Form (no form no.)
<input type="checkbox"/>	A-33	Experience Modification Rate (EMR) / Recordable Incident Rate / Lost Time Incident Rate (JPL 7245-A33)

### **GROUP B – Those marked with an “X” are for use in preparing your quotation/proposal:**

#### **Non-Construction and Construction Solicitation Types:**

<input type="checkbox"/>	B-1	Waiver of Rights to Inventions (Form JPL 62-301-B1)
<input type="checkbox"/>	B-2	Summary Work Breakdown Structure (no Form number)
<input type="checkbox"/>	B-4	° Instructions for Patent Agreement for Use in Support Service Subcontracts (Form JPL 2844-B4)
		° Patent and Copyright Agreement (Form JPL 1929-B4)
<input type="checkbox"/>	B-5	Notice of Requirement of Pre-award On-Site Equal Opportunity Compliance Review (Form JPL 3553-B5)
<input type="checkbox"/>	B-6	Subcontracting Plan Requirements (Form JPL 0294-B6) (If applicable, Plans must be provided with Proposal)
<input type="checkbox"/>	B-7	Security Requirements for a Classified Subcontract (Form JPL 2891-B7)
<input checked="" type="checkbox"/>	B-8	Notice of Reqs. for Affirmative Action to Ensure Equal Employment Oppt. (E.O. 11246) (Form JPL 2899-B8)
<input type="checkbox"/>	B-9	<input type="checkbox"/> Notice to Prospective Subcontractors of Req. for an Environ. Audit of the Lease Facilities JPL 2896-B9)
		<input type="checkbox"/> Notice to Prospective Subcontractors of Req. for an Environ. Audit of the Lease Fac.- Alt. (JPL 2896-B9-ALT)
<input type="checkbox"/>	B-10	Certificate of Current Cost or Pricing Data (Form JPL 2496-B10)
<input type="checkbox"/>	B-11	Stds of Conduct & Proc. for Handling Subcontr. Personnel Problems, Discipline, & Separation (JPL 4412)
<input type="checkbox"/>	B-12	Unescorted Access - Subcontractor Badging Instructions and Reqs (during time of solicitation)(7394-B12)
		Unescorted Access - Subcontractor Badging Instructions and Reqs (during time of subcontract) (7394-B12-Sub)
<input type="checkbox"/>	B-13	Claims for Exceptions to Cost or Pricing Data (Form JPL 2703-B13)
<input checked="" type="checkbox"/>	B-17	JPL Subcontractor Environmental, Safety, & Health Requirements (Form JPL 2885)
<input type="checkbox"/>	B-18	Experience Modification Rate (EMR) / Recordable Incident Rate / Lost Time Incident Rate (JPL 7245-B18)
<input type="checkbox"/>	B-19	Additional General Provision (AGP) “Safety and Health” (If applicable, plan required before award); see AGP Set.

#### **Construction Solicitation Type Only:**

<input type="checkbox"/>	B-31	Notice to Offerors (Form JPL 2843-B31)
<input type="checkbox"/>	B-32	Payment Bond (Form JPL 1826-B32)
<input type="checkbox"/>	B-33	Performance Bond (Form JPL 1827-B33)
<input type="checkbox"/>	B-34	Notice of Award (letter) (Form JPL 0141-B34)
<input type="checkbox"/>	B-35	Notice to Proceed (Form JPL 0474-B35)

**Acknowledgement**  
*(RFP Attachment A-1)*

***(This completed acknowledgement must accompany your offer)***

**Offeror Identification/Point of Contact**

1. Offeror name:

**Note:** Include the full name of the firm (not just any operating division) that would be required by you to appear on a subcontract, if one were to be awarded to your firm.

2. Name and telephone number of persons authorized to conduct negotiations:

Name:

Phone Number:

Name:

Phone Number:

**Offeror Information**

3. Please indicate your Business Classification and Organization Type:

<b>Business Classification</b> <i>(check all appropriate boxes in the left <b>OR</b> right column)</i>	
<input type="checkbox"/> Large Business <input type="checkbox"/> Nonprofit Organization <input type="checkbox"/> Foreign Business/Institution <input type="checkbox"/> Government <input type="checkbox"/> Educational Institution <input type="checkbox"/> Historically Black Colleges & Universities/Other Minority Institutions (HBCU/MI)	<input type="checkbox"/> Small Business (SB) <i>(plus any of the below, if appropriate)</i> <input type="checkbox"/> Small Disadvantaged Business (SDB) <input type="checkbox"/> Woman-Owned (WOSB) <input type="checkbox"/> HUBZone (HUB) <input type="checkbox"/> Veteran-Owned (VOSB) <input type="checkbox"/> Service-Disabled VO (SDVOSB)

<b>Organization Type</b> <i>(check the appropriate type)</i>
<input type="checkbox"/> Individual/Sole proprietor, under the laws of the State of _____. <input type="checkbox"/> Partnership, under the laws of the State of _____. <input type="checkbox"/> Corporation; incorporated under the laws of the State of _____. <input type="checkbox"/> Non-profit <input type="checkbox"/> Government <input type="checkbox"/> Tax Exempt payee <input type="checkbox"/> Limited Liability Company (LLC) --- If "LLC" is checked, you must also select one of the following tax classifications: <input type="checkbox"/> D=disregarded <input type="checkbox"/> C=corporation <input type="checkbox"/> P=partnership

**Offeror Income Tax Information**

4. To comply with CA Revenue and Taxation Code 18662 and CA Franchise Tax Board FTB Publ. 1023, and Internal Revenue Code 1441, JPL must determine if any tax reporting and tax withholding requirements are applicable. See "Notice of Potential Tax





Withholding" in the "Subcontracts Form Set" located at:

<http://www.jpl.nasa.gov/acquisition/terms-conditions/> for additional information.

Type(s) of Proposed Items (*please check all that apply*):

- ☐ Goods (commercial off-the-shelf items, no customization)
- ☐ Customized Goods (goods made or modified for JPL use)
- ☐ Services (R&D, consulting, contract labor, training services, etc.)
- ☐ Rents/Leases (tangible or real property)
- ☐ Royalty/Software

**If ONLY the "Goods" box is checked in the above "Type(s) of Proposed Items," skip the "Offeror Information" and "Source of Income" questions below and proceed to Paragraph 5.**

<b>Offeror Information</b>		
• Is the payee a <b>non</b> -U.S. Resident (i.e., foreign) individual or supplier?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Is the payee a <b>non</b> -California resident individual or supplier?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Has the legal name of your organization changed, or the Taxpayer ID changed, or the organization type changed since your last order/subcontract with JPL?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<b>Source of Income</b>		
• Is the purchase for U.S. sourced income payment? (U.S. sourced income exists if the location of any labor performed or rental/lease of property or use of software is in the U.S.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Is the purchase for State of California sourced income payment? (CA sourced income exists if the location of any labor performed or rental/lease of property or use of software is in the State of California)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Terms and Conditions

5. The Offeror acknowledges that the offer will be valid for 150 days after the date for receipt of offers specified on the cover page of this solicitation.
6. Your submittal of a proposal or quotation certifies your compliance with the requirements specified in form JPL 2892, "Certifications," attached to the General Provisions.
7. Can you supply the requested items through a Federal Supply Schedule (GSA) Contract?  
☐ **Yes** If yes, list **FSS (GSA) Contract No.:** ; skip No. 8.  
☐ **No** If no, complete the remainder of this form.
8. The Offeror ☐ acknowledges ☐ does not acknowledge the following are acceptable with no modifications, additions, or deletions in case of subcontract award: the Specimen Subcontract and its: Schedule/Articles, any exhibits and attachments, General Provisions



(GPs) Set\*, Additional General Provisions (AGPs) Set\* (if applicable), and Subcontract Forms Set.\* (\*can be found at <https://www.jpl.nasa.gov/acquisition/terms-conditions/>)

**Note:** Many of the GPs and AGPs cannot be altered without NASA approval. **If you answer “does not acknowledge” above, attach a detailed explanation of the exception(s), including a thorough rationale for each exception.**

<b>Buy American Act</b>
-------------------------

9. Preference will be given to United States (U.S.) domestic end products under the Buy American Act (BAA) for those items to be used in the U.S.

*The Offeror certifies that each end product/service to be supplied is domestic, as defined in the BAA, except for those which the Offeror has listed, with country of origin shown, on a separate attachment to this Acknowledgment and that components of unknown origin were considered by the Offeror to have been mined, produced, or manufactured outside the U.S. The Offeror also certifies whether the offeror qualifies for any special treatment as a signator to any international agreements, such as designated country status under the Trade Agreements Act.*

**Audit/EEO Information**

10. Name, address, phone number of cognizant Government Audit Agency representative:

**Name:**

**Address:**

**Phone:**

11. (A) Audit Reports. The Offeror agrees that all Government audit reports directly related to its offer(s) and subcontract, if any, resulting from this solicitation are authorized to be released to JPL. ☐ Yes ☐ No
- (B) Is your organization a State or Local Government or Nonprofit Organization subject to Uniform Guidance 2 CFR200? ☐ Yes ☐ No

If yes, the “year ending” date of the most recent report is: *(Attach a copy of the most recent report, unless previously submitted to JPL).*

12. All prospective procurements (excluding construction) with an estimated contract value of \$10,000,000 or more require that a determination be made by the Department of Labor (DOL) regarding a prospective domestic subcontractor’s Equal Employment Opportunity (EEO) status. A determination that the Offeror is either in compliance or is able to comply with EEO laws is a prerequisite to the Offeror’s eligibility for award.

If the offer is for \$10,000,000 or more, the Offeror acknowledges that it ☐ has ☐ has not successfully survived an EEO survey within two years of the anticipated award date. *(If the “has” box is checked, a copy of the EEO Clearance should be included with the offer).*



### Earned Value Management (EVM)

13. Does your organization have a validated earned value management (EVM) system?  
☐ Yes ☐ No

If yes, validation certified by:

- ☐ Government Agency name:  
☐ Self-Certified  
☐ Dollar threshold at which your organization's internal policy requires EVM:

### Offeror Certification

I, the undersigned, hereby declare that I am a duly authorized representative of the organization below, and I can certify and commit the organization regarding the information on this form, including the total offer amount submitted in response to RFQ/RFP No. [REDACTED].

Further, the Offeror acknowledges receiving the following Addenda No(s). to the RFQ/RFP:

**Note:** Failure to acknowledge receipt of all Addenda may result in your offer being rejected.

### Organization:

**Note:** Insert legal name of the organization, not operating division. Such legal name is the name used on income tax filings.

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Type/Print Name: \_\_\_\_\_

Phone: \_\_\_\_\_

**Acknowledgement**  
**Commercial Items or Services**  
*(RFQ Attachment A-4)*

***(This completed acknowledgement must accompany your offer)***

**Offeror Identification/Point of Contact**

1. Offeror name:

**Note:** Include the full name of the firm (not just any operating division) that would be required by you to appear on a subcontract, if one were to be awarded to your firm.

2. Name and telephone number of persons authorized to conduct negotiations:

Name:  
 Name:

Phone Number:  
 Phone Number:

**Offeror Information**

3. Please indicate your Business Classification and Organization Type:

**Business Classification**

*(check all appropriate boxes in the left **OR** right column)*

- |   |  |
|---|--|
| <input type="checkbox"/> Large Business<br><input type="checkbox"/> Nonprofit Organization<br><input type="checkbox"/> Foreign Business/Institution<br><input type="checkbox"/> Government<br><input type="checkbox"/> Educational Institution<br><input type="checkbox"/> Historically Black Colleges & Universities/<br>Other Minority Institutions (HBCU/MI) | <input type="checkbox"/> Small Business (SB)<br><i>(plus any of the below, if appropriate)</i><br><input type="checkbox"/> Small Disadvantaged Business (SDB)<br><input type="checkbox"/> Woman-Owned (WOSB)<br><input type="checkbox"/> HUBZone (HUB)<br><input type="checkbox"/> Veteran-Owned (VOSB)<br><input type="checkbox"/> Service-Disabled VO (SDVOSB) |
|---|--|

**Organization Type**

*(check the appropriate type)*

- |   |
|---|
| <input type="checkbox"/> Individual/Sole proprietor, under the laws of the State of _____ (if applicable).<br><input type="checkbox"/> Partnership, under the laws of the State of _____ (if applicable).<br><input type="checkbox"/> Corporation; incorporated under the laws of the state of _____<br><input type="checkbox"/> Non-profit<br><input type="checkbox"/> Government<br><input type="checkbox"/> Tax Exempt payee<br><input type="checkbox"/> Limited Liability Company (LLC) --- If "LLC" is checked, you must also select one of the following tax classifications:<br><input type="checkbox"/> D=disregarded <input type="checkbox"/> C=corporation <input type="checkbox"/> P=partnership |
|---|

**Offeror Income Tax Information**

4. To comply with CA Revenue and Taxation Code 18662 and CA Franchise Tax Board FTB Publ. 1023, and Internal Revenue Code 1441, JPL must determine if any tax reporting

and tax withholding requirements are applicable. See "Notice of Potential Tax Withholding" in the "Subcontracts Form Set" located at:  
<https://www.jpl.nasa.gov/acquisition/terms-conditions/> for additional information.

Type(s) of Proposed Items (please check all that apply):

- ☐ Goods (commercial off-the-shelf items, no customization)  
☐ Customized Goods (goods made or modified for JPL use)  
☐ Services (R&D, consulting, contract labor, training services, etc.)  
☐ Rents/Leases (tangible or real property)  
☐ Royalty/Software

**If ONLY the "Goods" box is checked in the above "Type(s) of Proposed Items," skip the "Offeror Information" and "Source of Income" questions below and proceed to Paragraph 5.**

<b>Offeror Information</b>		
Is the payee a <b>non</b> -U.S. Resident (i.e., foreign) individual or supplier?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the payee a <b>non</b> -California resident individual or supplier?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Has the legal name of your organization changed, or the Taxpayer ID changed, or the organization type changed since your last order/subcontract with JPL?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<b>Source of Income</b>		
Is the purchase for U.S. sourced income payment? (U.S. sourced income exists if the location of any labor performed or rental/lease of property or use of software is in the U.S.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the purchase for State of California sourced income payment? (CA sourced income exists if the location of any labor performed or rental/lease of property or use of software is in the State of California)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<b>Terms and Conditions</b>
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5. The Offeror acknowledges that the quotation will be valid for   days after the date for receipt of quotations specified on the cover page of this Request for Quotation (RFQ).
6. Your submittal of a quotation over \$25,000 certifies that your organization has provided full disclosure in writing to JPL regarding whether, as of the anticipated time of award of any subcontract resulting from the RFQ, your organization anticipates that it or its principals will be debarred, suspended, proposed for debarment or listed on the Denied Parties List by the U.S. Federal Government. (See FAR 9.404 for information on the List of Parties Excluded from Procurement Programs.)
7. Can you supply the requested items through a Federal Supply Schedule (GSA) Contract?  
☐ **Yes** If yes, list **FSS (GSA) Contract No.:**  ; skip No. 8.  
☐ **No** If no, complete the remainder of this form.

8. The Offeror ☐ *acknowledges* ☐ *does not acknowledge* the following are acceptable with no modifications, additions, or deletions in case of subcontract award: the Specimen Subcontract and its: Schedule/Articles, any exhibits or attachments, General Provisions (GPs) Set\*, Additional General Provisions (AGPs) Set\* (if applicable), and Subcontract Forms Set.\* (\*can be found at <https://www.jpl.nasa.gov/acquisition/terms-conditions/>)

**Note:** *Many of the GPs and AGPs cannot be altered without NASA approval. If you answer “does not acknowledge” above, attach a detailed explanation of the exception(s), including a thorough rationale for each exception.*

<b>Buy American Act</b>
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9. Preference will be given to United States (U.S.) domestic end products under the Buy American Act (BAA) for those items to be used in the U.S. and under the Balance of Payments Program (BPP) for supplies and services (including construction) to be used outside the U.S.:

*The Offeror certifies that each end product/service to be supplied under a proposed subcontract where the supply portion of the proposed subcontract exceeds \$3,000, is domestic as defined in the BAA and BPP, except for those which the Offeror has listed, with country of origin shown, on a separate attachment to this Acknowledgment and that components of unknown origin were considered by the Offeror to have been mined, produced, or manufactured outside the U.S. The Offeror also certifies whether the Offeror qualifies for any special treatment as a signator to any international agreements, such as designated country status under the Trade Agreements Act.*

**Offeror Certification**

**I, the undersigned, hereby declare that I am a duly authorized representative of the organization below, and I can certify and commit the organization regarding the information on this form, including the total offer amount submitted in response to RFQ/RFP No. [REDACTED]. (If an oral request for Quotation/Proposal was used, insert the reference number, if any.)**

Further, the Offeror acknowledges receiving the following Addenda No(s). to the RFQ/RFP:

**Note:** *Failure to acknowledge receipt of all Addenda may result in your offer being rejected.*

**Organization:**

**Note:** *Insert legal name of the organization, not operating division. Such legal name is the name used on income tax filings.*

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Type/Print Name: \_\_\_\_\_



## Notice of Total Small Business Set-Aside - Modified

(RFP/ITB/PO Attachment A-7)

1. Definition. "Small business concern" means a concern, including its affiliates, which is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and meets the size standards set forth in the Small Business Administration Rules and Regulations, 13 CFR Part 121 - Small Business Size Standards, and identified by the NAICS Code(s) in Paragraph 2. below.
2. Size Standard(s) for the Solicited Work. The North American Industry Classification System (NAICS) Code(s) applicable to this Subcontract is (are): \_\_\_\_\_.
3. General.
  - 3.1 Offers are solicited only from small business concerns; offers received from others shall be considered non-responsible and will be rejected.
  - 3.2 Any award resulting from this solicitation will be made to a small business concern.
4. Agreement. The offeror agrees to furnish, in performing the Subcontract, only end items manufactured and/or produced by business concerns inside the United States, its territories and possessions, the Commonwealth of Puerto Rico, the Trust Territory of the Pacific Islands, or the District of Columbia. However, this requirement does not apply in connection with construction or service subcontracts.
5. Small Business Status Certification. The offeror must indicate in the Certification, on the reverse side of this form, its small business status and whether it agrees to provide domestic end items. The Certification must then be signed by the offeror or duly authorized representative. **Failure to complete and return this form with the offer may render the offer nonresponsive.**
6. Notice: Consequences of Misrepresenting Small Business Status. Any subcontract to be awarded pursuant to this solicitation will be a subcontract under a prime contract between the California Institute of Technology/JPL and NASA, and awards to small businesses are counted for small business goal purposes pursuant to the Small and Small Business Plan incorporated into the prime contract. Consequently, any person who misrepresents a firm's small business status to obtain a subcontract from JPL under a set-aside procurement would be subject to sanctions under 15 U.S.C. 645(d), which provides that any person making such a misrepresentation shall:
  - 6.1 Be punished by imposition of fine, imprisonment, or both;
  - 6.2 Be subject to administrative remedies, including suspension and debarment; and
  - 6.3 Be ineligible for participation in programs conducted under the authority of the Small Business Act.

## CERTIFICATION



The offeror represents and certifies as part of its offer that it ☐ is ☐ is not a small business concern as described in Paragraph 1. above. By indicating that it is a small business concern, the offeror certifies that it meets the size standards for the North American Industry Classification System (NAICS) Code number(s) identified in Paragraph 2. above for the product/work involved. If the offeror is a small business, please identify additional category(ies) which apply:

- ☐ Small Disadvantaged    ☐ Woman-Owned    ☐ Veteran-Owned    ☐ HUBZone
- ☐ Service-Disabled Veteran-Owned

If this solicitation calls for more than one item/type of work and if different NAICS Codes are identified above for different items/types of work, the offeror certifies that it meets the identified NAICS Code applicable to the product/work accounting for the greatest percentage of the proposed subcontract price or, if offers on part of the product/work are permitted, that it meets those of the NAICS Code standard(s) identified above applicable to the products/work it offers.)

The offeror ☐ agrees ☐ does not agree to furnish, in performing the subcontract, only end items which meet the requirements of Paragraph 4. above.

The offeror represents and certifies, for information only, that ☐ all ☐ not all end items to be furnished will be manufactured or produced by small business concerns. (This requirement does not apply in connection with construction or service subcontracts.)

Subcontractor Name: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Type/Print Name: \_\_\_\_\_

## **Past Performance**

*(RFP/ITB Attachment A-14)*

### **Introduction**

1. This Attachment sets forth the requirements to be followed in preparing information on your Past Performance. The information provided will be used to help determine responsibility and must be provided in writing by the date indicated in the RFP.
  - Please provide the Past Performance Volume of your proposal in the same number of copies as your Cost Proposal, unless otherwise indicated by JPL in the RFP Cover Letter.
  - If the Technical/Management part of your proposal is to be presented via an Oral Presentation, then the written Past Performance Volume of your proposal is due by the date indicated on the RFP Title Sheet.

### **Requirement**

2. Provide a synopsis of the five most recent contracts performed by your organization which are similar to the effort described in this RFP.
3. If this RFP contains an evaluation criterion or factor entitled "related experience," please include a synopsis of ALL the efforts you listed in response to that criterion or factor. These synopses must include the following information:
  - Customer Name/Address
  - Subcontract No.
  - Subcontract Type
  - Period of Performance
  - Task or Support Type
  - Average No. of Personnel Assigned to Effort
  - Initial Cost/Price
  - Current/Final Cost/Price
  - Overrun (if any, explain)
  - Description of Effort
  - Current Contract and Technical Persons
    - Telephone Nos.
    - Emails
  - What is/was your functional relation to the subcontract effort?

**Notice of Requirements for Affirmative Action to Ensure Equal  
Employment Opportunity (Executive Order 11246)**

*RFP/ITB Attachment B-8*

1. The goals and timetables for minority and female participation, expressed in percentage terms for the Subcontractor's aggregate work force in each trade on all construction work in the covered area, are as follows, effective from October 3, 1980, until further notice:

For the Following Calif. Counties	Goals for Each Trade	
	For Minority Participation	For Female Participation
Kern	19.1%	6.9%
Los Angeles	28.3%	6.9%
Riverside & San Bernardino	19.0%	6.9%

2. These goals are applicable to all the Subcontractor's construction work (whether or not it is Federal or federally assisted) performed in the covered area.
3. The Subcontractors compliance with the Executive Order and the regulations in 41 CFR 60-4 shall be based on its implementation of the Equal Opportunity Article, specific affirmative action obligations required by the specifications set forth in 41 CFR 60-4.3(a), and its efforts to meet the goals established for the geographical area where the Subcontract is to be performed. The hours of minority and female employment and training must be substantially uniform throughout the length of the Subcontract, and in each trade, and the Subcontractor shall make a good faith effort to employ minorities and women evenly on each of its projects. The transfer of minority or female employees or trainees from contractor to contractor or from project to project for the sole purpose of meeting the Subcontractor's goals shall be a violation of the Subcontract, the Executive Order and the regulation in 41 CFR 60-4. Compliance with the goals will be measured against the total work hours performed.
4. The Subcontractor shall provide written notification to the Director of the Office of Federal Contract Compliance Programs within 10 working days of award of any construction subcontract in excess of \$10,000 at any tier for construction work under the Subcontract. The notification shall list:
  - The name, address and telephone number of the subcontractor;
  - Employer identification number;
  - Estimated dollar amount of the subcontract;
  - Estimated starting and completion dates of the subcontract; and
  - The geographical area in which the contract is to be performed.
5. As used in this Notice and in the Subcontract, the "covered area" is the county in which the subject project is located.